

OFFICE OF THE GENERAL COUNSEL
Division of Operations-Management

MEMORANDUM OM 11-56(NxGen)

April 27, 2011

To: All Regional Directors, Officers-in-Charge,
and Resident Officers

From: Richard A. Siegel, Associate General Counsel

Subject: NxGen Deployment Plan, Revised Schedule and Expectations

On April 18, 2011, the Agency's Next Generation Case Management System (NxGen) was fully deployed to Region 9, Cincinnati and Region 10, Atlanta. While the deployment was completed and CATS was retired in these two Regions, our NxGen developers continue to work on enhancements to the system based on feedback from users in the two pilot Regions during the training. A new release is scheduled to be deployed in June to provide improvements to the system based on user feedback.

Based on our training experience in Regions 9 and 10, we have decided to modify our deployment plans to spend two weeks, rather than one week, training in each Regional Office during the initial visit. Two consecutive weeks will allow the trainers to spend more time with the staff and enhance the comfort level for the Region as we make this significant transition from case tracking to case management. Regions 1, 2, 4, 5, 6, 7, 13, 17, 18 and 28 will be deployed and trained during the weeks of June 13 through 24, 2011. Regions 8, 11, 15, 22, 24, 25 and 30 will be deployed and trained during the weeks of July 11 through 22, 2011. Regions 3, 12, 14, 16, 19, 20, 21, 26, 27, 29 and 32 and Subregion 37 will be deployed and trained during the weeks of August 8 through 19, 2011. Finally, Regions 27, 31 and 34 will be trained during the weeks of September 12 through 23, 2011.

The first week of the training will continue to be hour-long classes broken down among professionals, support staff employees and managers and supervisors that will cover all the functions that staff members will be performing in NxGen. Typically, a professional or support staff employee will be in 1 or 2 classes per day. After the classes, employees will return to their desk and can work with the NxGen functions that they learned, as well as performing other casehandling work. This will enable them to bring any questions they might have to the trainers while they are on-site. Classes will be limited to 10 employees at a time in order to provide hands on training. We are encouraging supervisors and managers to participate in all classes as we transition to a new case management system and the full utilization of an electronic case file.

Topics for the week include an overview of NxGen and learning common NxGen functions, such as how to query for a case or party, how to navigate in the system and how to make selections from multi-value fields. There will be training for support staff on creating Actions in NxGen, entering and capturing information about case processing as it occurs, and scanning and uploading documents. There will be training for professionals on how to

handle I.O. duties in NxGen and how to navigate within the system. All employees will be trained on using the new correspondence templates, which are utilized to generate Word documents, such as service letters, dismissal letters, deferral letters and other common case processing documents, while working in NxGen. These documents are then automatically uploaded into NxGen and will capture key case processing information as they are issued. All employees will be trained on creating charges and petitions in NxGen. Managers and supervisors will be trained on all system functions as well as on running reports to manage the office and running performance Regional statistics.

During the second week of training, the trainers will work one-on-one with employees to assist them in working in NxGen and will conduct follow-up or refresher classes, as needed. Because CATS will be read-only when NxGen is deployed, the Region will be conducting all of its business in NxGen.

A revised training schedule is attached. Please alert your staffs to these dates. Each Region will be responsible to schedule and conduct follow-up training two to four weeks after the initial two-week training is completed to reinforce the training that was learned during the initial training.

OCIO will be adding additional resources to the Helpdesk to assist users with NxGen questions and we will continue to provide NxGen training resources on the Operations page of Surfboard.

We recognize that this shift in the training schedule will cause further inconvenience and we deeply regret it. While it is important that every person in the office be available for training, we recognize that may not be possible for those who have made plans for the periods that they did not expect to be used for NxGen training. However, we believe that this change will substantially enhance the training and greatly assist the transition to NxGen. Thank you again for your patience.

/s/

R.A.S.

Attachment

cc: NLRBU

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